

# The art of resource management

A guide to smarter resource planning  
in an ever-changing world

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DELIVER WITH INTELLIGENCE



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# Ever thought, there must be a better way to run a services business?

Today's market dynamics and pressures are triggering professional services organizations to reimagine your strategies and processes to ensure organizational resilience. You are being asked to offer up new business offerings and delivery methods. You are being called upon to consistently deliver valuable engagements remotely via geographically distributed teams while harnessing niche skill sets. And all of this is happening in the midst of an unpredictable labor market where you must maximize what you have.

To that end, professional services' success requires an evolution in how organizations unleash the power of their talent and retain their best people. It's not just about ensuring the right availability or skillset but also about consultants working on fulfilling projects that align with their career objectives.

This ebook explores these trends and issues and outlines a modern solution purpose-built to drive optimal resource management, knowing you will most likely not be adding to the pool.

# Redefining success in an era of continuous transformation

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**Are continuous disruptions the new normal? And if so, are professional services organizations prepared to manage this reality?**

Even after the initial shock of COVID, organizations continue to be assailed by an array of significant macro events:

- Unpredictable labor market
- The return of inflation
- Retaining high-quality talent
- An evolving hybrid work environment
- Nagging, unanticipated supply chain issues

On top of all that, specific industries and markets face numerous micro disruptions. With no sign of these challenges going away, reimagining the organization's business model is key to success.

# What is organizational resilience?

Organizational resilience as the ability of an organization to resist, absorb, recover and adapt to business disruption in an ever-changing and increasingly complex environment to enable it to deliver its objectives, and rebound and prosper. ,,

**Gartner**

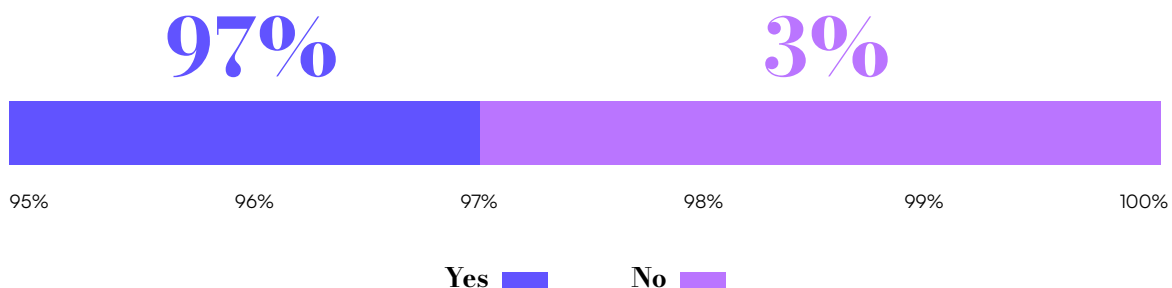
Building Organizational Resilience Is a Strategic Imperative, 2022

Nimble businesses are adapting to the emerging new normal and taking advantage of pent-up market demand. They understand that disruption presents both a strategic opportunity and an existential threat to a business. **But success will require a focus on innovation and organizational transformation.**

In that vein, savvy professional services organizations have evolved to embrace a mindset of continuous transformation. In fact, the teams that did so succeeded with remote delivery during all the shifting of business protocols in most recent years. According to the 16th Annual Professional Services Maturity Benchmark™ Maturity Benchmark from Service Performance Insight, annual revenue generated per consultant reached \$208,000, and year-over-year professional services revenue grew 10.4% on average.

No wonder 97% of professional services teams say they plan to continue delivering projects remotely that had previously been delivered onsite according to TSIA.

**Do you intend to keep delivering some services remotely that were previously delivered onsite?**



Source: TSIA COVID-19 Rapid Response (R3) Surveys

# Prioritize resource management

Many of these professional services teams thrived during the latest disruption — and continue thriving amidst turmoil — by zeroing in on resource management. In fact, resource management is the number one issue for professional services organizations, according to TSIA.

But some companies focus too intently on process optimization when it comes to managing resources. While better utilization is an important, profit-enhancing goal, an overfocus can cause undue collateral damage. When process purity comes at the expense of workforce satisfaction, engagement, and development — especially at a time when it's so important to keep your best talent — organizations find themselves dealing with expensive disruption and having to do more with less.

With so many other forms of disruption swirling around, organizations are smart to minimize disruption wherever they can.

And while workforce stability has always been a priority for services firms, it's time they take a fresh look at how they manage and retain their people resources.

One might say PSOs  
worked harder  
in 2022, but not  
necessarily smarter.

**SPI**

16th Annual Professional Services Maturity™ Benchmark Report

# Broaden your view of project staffing

Thriving in the midst of these trends demands a new approach to optimized staffing. Professional services organizations need to go beyond forecasting capacity and demand, and modernize their resource management.

As professional services organizations seek to differentiate with innovative offerings, they rely more on their consultants' problem-solving and creative thinking. Fortunately, "young professionals are motivated by intrinsic challenge, the culture of innovation, and the opportunity to develop cutting-edge skills."

However, modern resource management is about more than knowing skills, availability, costs, and knowledge—and putting the right people on the right projects at the right time.

## **Balancing process with people in today's world means:**

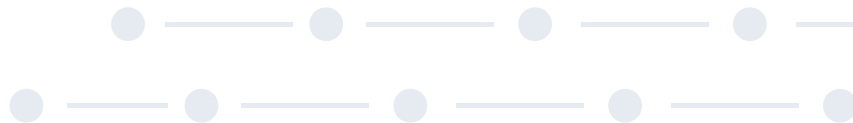
- Accounting for employees' career goals and desires
- Viewing open assignments and resource demands in the context of each other, rather than in a vacuum
- Identifying risks for potential burnout and making the necessary adjustments
- Remembering that the company's most precious resources walk out the door at the end of each workday ... possibly for the last time.



# The visibility factor

Fail to address these expectations, and professional services teams will find themselves with a rapidly growing backlog of projects and workforce disruptions they can't solve. Organizations must achieve the balance in the face of accelerated business relying on distributed teams managing complex projects.

Spending valuable time and resources coping with siloed spreadsheets and applications hinders growth and acts as an impediment to developing new, innovative offerings. The struggles that start with low visibility into projects and resources soon extend into nearly every aspect of a business. Planning for the future of the organization becomes particularly challenging. Without knowing if projects will run late or when key resources are available affects future commitments. Moreover, a lack of understanding around available capacity means sales teams can easily over- or under-sell the pipeline, and delivery teams will struggle with too much, too little, or not the right type of work.



The newest generation of workers has different expectations of the workplace, and will walk out the door without hesitation. With that in mind, TSIA says a good first step is designing or re-evaluating employee engagement programs in the context of remote work.

Professional Services Resource Management Technographic  
TSIA, 2022

# Harness Advanced Resource Management

The solution is Advanced Resource Management, which optimizes the staffing process for resource managers and provides an innovative experience for employees. By matching demand with supply from the earliest stages of opportunities, Advanced Resource Management from Certinia helps professional services organizations unlock the power of their greatest asset: their people.



# Empower employees with collaborative, innovative tools

Resource management should be a collaborative activity, with employees playing an active role in the process. Organizations can empower their employees and team members to take a more central role by identifying skill aspirations and expressing interest in work that is motivating to them. Team members can also receive prompts to update their skills based on previous assignments, and flag upcoming assignments of interest. This gives them more influence over the scheduling process and helps them chart the advancement of their own careers. Plus, employees are more likely to deliver better customer outcomes and stay with the organization if they're working on projects that interest them.





# Enable resource managers to optimize staffing

Certinia Advanced Resource Management streamlines the process of identifying each employee's most leverageable skills and upgrading those skills. By accessing a richer set of information on employee skills, strengths, experiences, certifications, aspirations, motivations and interests, managers can match assignments with employee profiles accordingly. They can also automatically search for resources and rank them across multiple requests. Certinia's software makes it possible to optimize deployments across multiple open assignments, forging past the limitations of one-on-one assignments to include soft booking and "what if" scenarios. Combined, these capabilities enable resource managers to optimize staffing plans and build stronger project teams.

Moreover, they make it possible to ensure alignment between sales and services from day one. By initiating the resourcing process as early as the estimate, Advanced Resource Management enables more complete resource requests, allows for predictable supply and demand management, and tightens the handoff from sales to delivery — all driving an innovative and seamless customer experience.

We were excited about the Certinia implementation because our team members can track their skills and certifications and even their aspirations. And when our resource management team is trying to pair the right people with the right projects, they can filter on skill sets and certifications. ”

**Monica Engelhardt, CFO**  
Clearsulting

# Make fast, spot-on decisions with robust forecasting tools

For professional services organizations, matching demand and capacity takes on more even importance during times of disruption. Certinia Advanced Resource Management provides real-time visibility into utilization performance and a clear understanding of who is over- or underutilized. A centralized view enables organizations to understand business performance, such as:

- What are project trends?
- Is our pipeline healthy?
- Are we closing deals at the same rate as before?
- What is our project backlog?

By surfacing this actionable information, the software empowers organizations to make high-impact decisions. From balancing demand across resources to identifying training and hiring opportunities, organizations gain the information needed to drive better results.

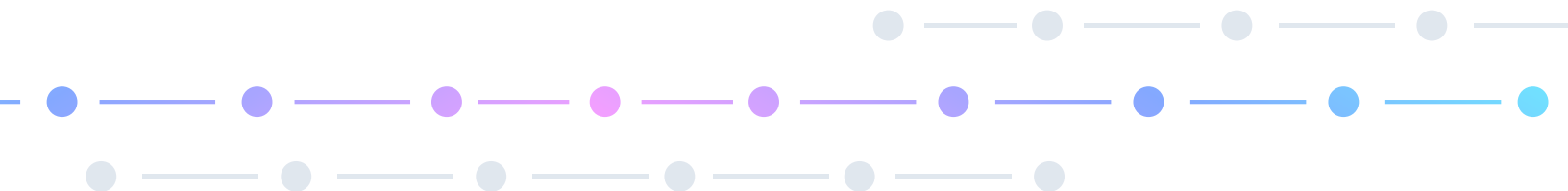
The cumulative impact of Advanced Resource Management is a more efficient staffing process, stronger project teams, maximized margins, and higher customer and employee satisfaction.

# Get the right solution for uninterrupted growth

Whether your organization is a standalone service provider or operates a services team within the larger enterprise, it's a must to respond to repeated disruptions with relentless innovation. To do so, you need a platform enabling continuous transformation.

With Advanced Resource Management for the professional services cloud, you can optimize resource management with confidence. The investments your organizations make now in resource management will continue to pay dividends. By investing in advanced resource management, you are positioned to elevate people's careers over time and keep your talent productive and happy so you continue delivering innovation no matter when disruption hits.

Learn how Certinia's Advanced Resource Management creates a more efficient staffing process, makes it easier to run a connected business, and results in higher margins and greater employee satisfaction.







# Experience Modern Delivery

Certinia elevates business growth through a complete Services-as-a-Business solution spanning services delivery, finance, and customer success. Native to the leading cloud platform, Salesforce, Certinia enables organizations to run a connected business, deliver with intelligence, and achieve agility at scale.

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